### Test Script M&R/CLARA/IMM/2022/004/0001

### Client(004)/General(0001)

***General Information***

|  |  |  |  |
| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Client General Created/updated/deleted Successfully | | | |

***Process***

| **Process** | **Step #** | **Steps** | **Expected Results** | **Actual Results** | **Pass/Fail/**  **Not executed** |
| --- | --- | --- | --- | --- | --- |
| Login | 1 | Enter the User ID and Password in the login page | Should be able to Login successfully and open the landing page |  |  |
| Client List | 2 | Click the Menu and navigate to CLIENT and click CLIENT MANAGEMENT button | Has to open the Client List page |  |  |
|  | 3 | Should display all the Client records based on L&E and Immigration |  |  |
| Search Client | 4 | Click Search Button | Has to open the search criteria fields |  |  |
| 5 | Search Options can be single or multiple. Enter the required search field values and click search. This will update the list page records according to the search |  |  |
| 6 | Click Reset button | On Clicking reset will clear the search field values and will make all the fields as blank & Click search again will provide the unfiltered list |  |  |
| Options | 7 | Click Options button | Will display the required options for this screen |  |  |
| 8 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |
| List search | 9 | Enter the required values in the Search field on the top of list page | Will filter the records according to search criteria in the list page |  |  |
| Edit Client | 10 | Select a client and Click Options button and then click Edit icon | Has to display the Client details with General tab |  |  |
|  |  |  | **General screen** |  |  |
|  |  |  | **Personal details tab** |  |  |
|  | 11 |  | First Name - Auto Populate/Editable |  |  |
|  | 12 |  | Last Name - Auto Populate/Editable |  |  |
|  | 13 |  | Middle Name - Auto Populate/Editable |  |  |
|  | 14 |  | Full Name - Auto Populate/Editable |  |  |
|  | 15 |  | Client Category - Auto Populate/ Editable |  |  |
|  | 16 |  | Corporation - Editable (Mandatory if Client Category is Corporate Employee) |  |  |
|  | 17 |  | Petitioner - Editable (Mandatory if Client Category is Dependent) |  |  |
|  | 18 |  | Class - Non-Editable |  |  |
|  | 19 |  | Referral Source- Editable |  |  |
|  |  |  | **Address tab** |  |  |
|  |  |  | **General Address** |  |  |
|  | 20 |  | Address - Editable |  |  |
|  | 21 |  | Door No- editable |  |  |
|  | 22 |  | City- Editable |  |  |
|  | 23 |  | State- Editable |  |  |
|  | 24 |  | Zip - Editable |  |  |
|  | 25 |  | Country - Editable |  |  |
|  | 26 |  | Is the mailing address same as the general address? - Editable |  |  |
|  | 27 |  | Mailing address- Editable |  |  |
|  |  |  | **Mailing Address** |  |  |
|  | 28 |  | Address - Editable |  |  |
|  | 29 |  | Door No- editable |  |  |
|  | 30 |  | City- Editable |  |  |
|  | 31 |  | State- Editable |  |  |
|  | 32 |  | Zip - Editable |  |  |
|  | 33 |  | Country - Editable |  |  |
|  | 34 |  | Is the Billing address same as the Mailing address? - Editable |  |  |
|  | 35 |  | Billing address- Editable |  |  |
|  |  |  | **Billing Address** |  |  |
|  | 36 |  | Address |  |  |
|  | 37 |  | Door No- editable |  |  |
|  | 38 |  | City- Editable |  |  |
|  | 39 |  | State- Editable |  |  |
|  | 40 |  | Zip - Editable |  |  |
|  | 41 |  | Country - Editable |  |  |
|  |  |  | **Phone/E Mail tab** |  |  |
|  | 42 |  | Cell - Editable |  |  |
|  | 43 |  | Alternate Contact - Editable |  |  |
|  | 44 |  | Work - Editable |  |  |
|  | 45 |  | Home - Editable |  |  |
|  | 46 |  | E Mail - Editable |  |  |
|  | 47 |  | Fax - Editable |  |  |
|  | 48 |  | Alternate E Mail - Editable |  |  |
|  |  |  | **Other details tab** |  |  |
|  | 49 |  | Soc Security No - Editable |  |  |
|  | 50 |  | Consultation date - Non-Editable |  |  |
|  | 51 |  | Occupation - Editable |  |  |
|  | 52 |  | Prospective Client ID - Non-Editable |  |  |
|  | 53 |  | Inquiry No - Non-Editable |  |  |
|  |  |  | **Admin tab** |  |  |
|  | 54 |  | Created by - Non-Editable |  |  |
|  | 55 |  | Created on - Non-Editable |  |  |
|  | 56 |  | Updated by - Non-Editable |  |  |
|  | 57 |  | Updated on - Non-Editable |  |  |
|  |  |  | **Status tab** |  |  |
|  | 58 |  | Status - Editable |  |  |
|  | 59 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 60 |  | On Clicking Save button, 1. will update the changes for the selected Client  2. Receive success Message |  |  |
| Cancel Update | 61 |  | On Clicking cancel button, Close the Pop-up screen and go back to Client List page |  |  |
| Update in DocketWise System | 62 | once Client is updated in CLARA | Have to automatically Update the respective Contact in Docketwise system with below fields |  |  |
|  |  |  | First Name |  |  |
|  |  |  | Last Name |  |  |
|  |  |  | middle Name |  |  |
|  |  |  | email |  |  |
|  |  |  | type - (Based on selected Client Category ID from CLARA this field will be updated) |  |  |
|  |  |  | street number and name |  |  |
|  |  |  | apartment number |  |  |
|  |  |  | city |  |  |
|  |  |  | state |  |  |
|  |  |  | zip code |  |  |
|  |  |  | number |  |  |
| Display Client | 63 | Select a client and Click Options button and then click display icon | Has to display the Client details with General tab |  |  |
| Delete Client | 64 | Select a client and Click Options button and then click delete icon | Delete button should be disabled. Client deletion should not be possible, only status change from Active to In-Active is allowed |  |  |
| Create New Client | 65 | Click the Menu and navigate to CLIENT and click CLIENT\_NEW button | Will Open New Client creation screen with General tab and display below fields |  |  |
|  |  |  | **Personal details tab** |  |  |
|  | 66 |  | First Name - Entry field |  |  |
|  | 67 |  | Last Name - Entry field |  |  |
|  | 68 |  | Middle Name - Entry Field |  |  |
|  | 69 |  | Full Name - Entry Field |  |  |
|  | 70 |  | Client Category - Select suitable Client category from dropdown  (Options - Individual, Corporate, Corporate employee, Independent) |  |  |
|  | 71 |  | Corporation - Select suitable corporate Client ID from dropdown  (Mandatory if Client Category - Corporate employees) |  |  |
|  | 72 |  | Petitioner - (Mandatory if Client Category - Independent) |  |  |
|  | 73 |  | Class -Select Class from dropdown |  |  |
|  | 74 |  | Referral - Select Referrals from dropdown |  |  |
|  |  |  | **Address tab** |  |  |
|  |  |  | **General Address** |  |  |
|  | 75 |  | Address - Entry field |  |  |
|  | 76 |  | Door No- Entry field |  |  |
|  | 77 |  | City- Entry field |  |  |
|  | 78 |  | State- Entry field |  |  |
|  | 79 |  | Zip - Entry field |  |  |
|  | 80 |  | Country - Entry field |  |  |
|  | 81 |  | Is the mailing address same as the general address? - Selection |  |  |
|  | 82 |  | Mailing address-Auto populate/Entry |  |  |
|  |  |  | **Mailing Address** |  |  |
|  | 83 |  | Address - Entry field |  |  |
|  | 84 |  | Door No - Entry field |  |  |
|  | 85 |  | City - Entry field |  |  |
|  | 86 |  | State - Entry field |  |  |
|  | 87 |  | Zip - Entry field |  |  |
|  | 88 |  | Country - Entry field |  |  |
|  | 89 |  | Is the Billing address same as the Mailing address? -Selection |  |  |
|  | 90 |  | Billing address- Auto populate/Entry |  |  |
|  |  |  | **Billing Address** |  |  |
|  | 91 |  | Address - Entry field |  |  |
|  | 92 |  | Door No - Entry field |  |  |
|  | 93 |  | City - Entry field |  |  |
|  | 94 |  | State - Entry field |  |  |
|  | 95 |  | Zip - Entry field |  |  |
|  | 96 |  | Country - Entry field |  |  |
|  |  |  | **Phone/E Mail tab** |  |  |
|  | 97 |  | Cell - Entry field |  |  |
|  | 98 |  | Work - Entry field |  |  |
|  | 99 |  | Home - Entry field |  |  |
|  | 100 |  | E Mail - Entry field |  |  |
|  | 101 |  | Fax - Entry field |  |  |
|  | 102 |  | Alternate E Mail - Entry field |  |  |
|  |  |  | **Other details tab** |  |  |
|  | 103 |  | Soc Security No - Entry field |  |  |
|  | 104 |  | Consultation date - Entry field |  |  |
|  | 105 |  | Occupation - Entry field |  |  |
|  | 106 |  | Docketwise Reference ID - Non-Editable, automatically generated for Immigration Clients after clicking Save |  |  |
|  | 107 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 108 |  | On Clicking Save button, 1. will created a new Client ID for the respective Client 2. Receive success Message  3. A new record is created in Client list page with Status "ACTIVE" 4. Respective User will receive notfication on New client |  |  |
|  | 109 | Client creation in QuickBooks | once client is created successfully in CLARA, a customer is automatically created in QuickBooks with same client ID |  |  |
|  | 110 | Client creation in DocketWise | once client is created successfully in CLARA, a contact is automatically created in Docketwise with same client ID with below fields |  |  |
|  |  |  | First Name |  |  |
|  |  |  | Last Name |  |  |
|  |  |  | middle Name |  |  |
|  |  |  | email |  |  |
|  |  |  | type - (Based on selected Client Category ID from CLARA this field will be updated) |  |  |
|  |  |  | street number and name |  |  |
|  |  |  | apartment number |  |  |
|  |  |  | city |  |  |
|  |  |  | state |  |  |
|  |  |  | zip code |  |  |
|  |  |  | number |  |  |

***Confirmation / Approval of Testing Results***

**Overall Testing Status:**

Pass and accepted

Passed with note \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Failed

**Comments:**

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**Approved by :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date :**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_